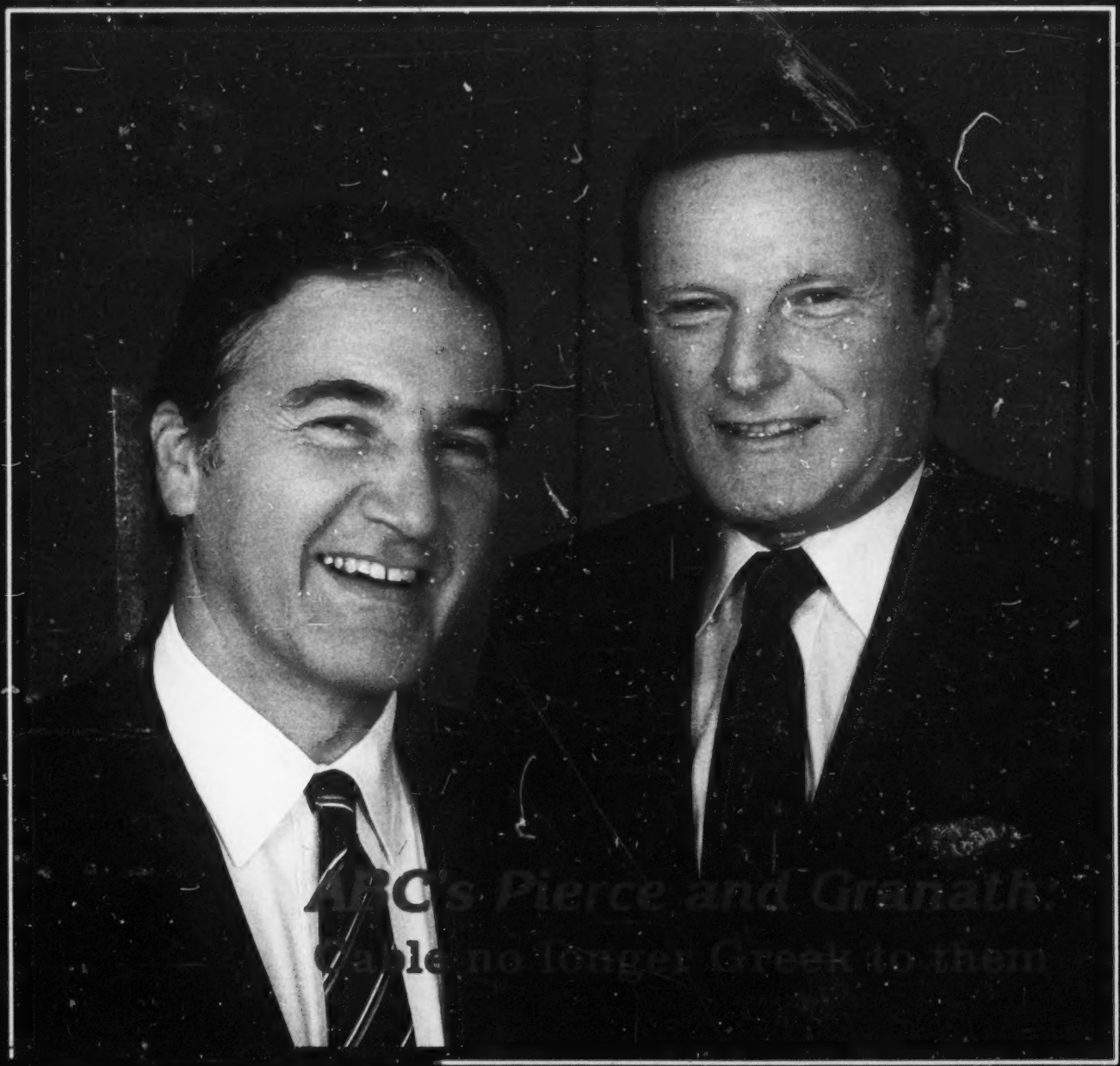
TC 8920-2

- Is QUBE's glamor fading?
- Group W announces HTN Plus, 12 hours a day
- Turner scores WASEC joint marketing deal
- SPN's Ed Taylor sets four-channel goal

CableVision

The news and features weekly of the cable television industry

October 12, 1981



ABC's Pierce and Granath: Cable no longer Greek to them

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CableVision Volume 7, Number 6. October 12, 1981

Between the lines/5
Letters/9
Cablescope/11
Newswire/12
Leading the week/17
Programming/27
Advertising/39
Taylor interview/43
Cable survey/51
Cover Story/57
Business/71
Government & Law/100
Weekly watch/111
Technology/113
People/117
Classifieds/118
Advertisers' Index/122
Events/123
From New York/124
Cable stats/127
Media scan/130

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Cover story

CableVision's Jeri Baker talks to ABC executives Fred Pierce and Herb Granath about the television network's overall plans for the future and what directions its cable ventures plan to go. **Page 57.**

Leading the week

In New York, RCTV, The Entertainment Channel, has finally announced its satellite plans and its officers, while in Washington, Senator Hollings stalls floor debate and Senators Packwood and Cannon have offered a joint compromise on S. 898. **Page 17-22.**

Plus one

Westinghouse forms a new family-oriented 12-hour "midi" service as companion to HTN. New network will be called HTN Plus. **Page 27.**

Jazzy cable

Bourbon Street becomes a programming highway this week, as 2,000 executives and 100 exhibitors pour into NCTA/CTAM's first Software Symposium. An overview of who's there, and possible highlights. **Page 27.**

A heartbeat away

A potential competitor to MTV gears up for launch next year, but not with a booth at the NCTA/CTAM Software Symposium. **Page 33.**

Double deal

WASEC and Turner Broadcasting form an agreement under which WASEC will rep advertising spots on Turner's two news services. In exchange, Turner gains a two-year lease on WASEC's Satcom I. **Page 39.**

Continuing education

AETN talks up use of longer ads as its way to move from red ink to black. A look at how the strategy is working out, now that the network is officially launched. **Page 41.**

Cable quad

SSS President Edward Taylor expresses his goals for making Satellite Program Network into a four-channel cable smorgasbord. **Page 43.**

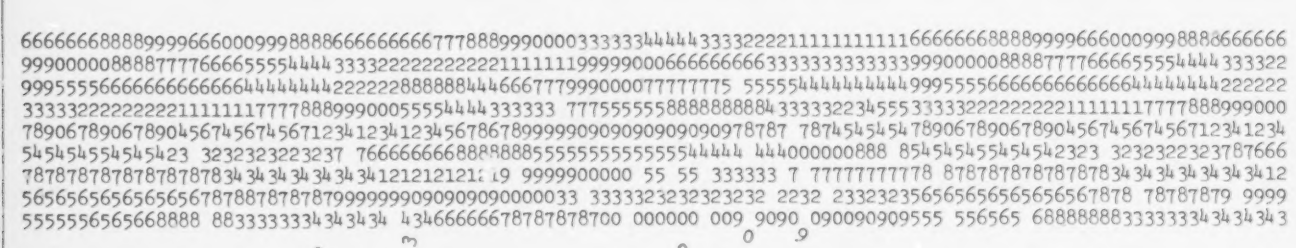
Crunching out numbers

Independent broadcast and cable research firm, Business Communications, Inc., releases its study on cable penetration percentages. **Page 51.**

QUBE tarnish?

Both *The Wall Street Journal* and *Newsweek* have recently come out with critical impressions of Warner Amex's interactive service. Gustave Hauser defends his cable flagship. **Page 71.**

An interesting, rather dominating view of ABC's headquarters, now the home of four cable networks. Cover photo by Steve Fenn, courtesy of ABC.



Numbers mill

Business Communications, Inc. (BCI), has recently conducted a survey on cable television programming and penetration for 1980-1981

Industry officials, advertisers, programmers and operators have continually bemoaned the fact that the cable industry has relatively little research to its credit. The Cabletelevision Advertising Bureau is on the move to supply more information and data about the industry as a whole and about the type of subscriber who desires cable programming. Advertising agencies are also beefing up their research operations in cable as evidenced by their increasing numbers at shows, conferences and cable clubs. It is evident that cable is seeking new sources for information. One company which specializes in national cable and broadcasting research is Business Communications, Inc. (BCI), based in Fort Worth, Texas. BCI recently completed a study which measures the 1980-'81 cable programming and penetration percentages. It has just been released to the industry.

The survey, according to Vice President and General Manager Bill Camfield, is the result of combining data gathered from 8,200 individual interviews on cable programming and marketing conducted by BCI during the past 18 months. The "national sample" is compiled as a by-product of studies conducted on behalf of clients applying for individual franchises across the nation.

Citing the significance of the study, Camfield states that each individual survey was structured to comply with 95 percent confidence levels and five percent statistical variations in *each* franchise area. Since the composite contains opinions expressed by residents of ten states (Texas, Louisiana, Florida, Arizona, Minnesota, Oregon, Maryland, Virginia, Michigan and California) and a balance between urban, rural and "bedroom" communities, as well as broad regional representation, the study is likely the most representative sample of national cable programming opinions yet compiled.

BCI, engaged in franchising and marketing research since 1974, plans this as the first of annual composite reports on cable and programming opinions.

All surveys were conducted by random telephone sampling methodology. Opinions represented in this composite are from members of the general public in areas in the franchising phase of cable service.

BCI's standard research format asked 22 questions of potential subscribers about various program preferences and cable tiering options. However, for purposes of the national composite, results are reported for only program category and cable-specific questions.

General program demand

The question is phrased: "Would you like to see much more, a little more, or no more of the following types of television programming?" The question is designed to represent program demand from *any* source: cable, cassette, disc, regular broadcast, etc. Cable, per se, is not specified at this stage of the questionnaire.

BCI finds that the following program categories elicit response from these percentages of the general public as being identified as in the "much more" category:

Full length movies	44.1 %
Documentaries	35.8
Shows for the family	33.5
News programs	31.0
Broadway type shows	30.7
Adventure shows	30.4
Comedies	30.0
National public affairs	29.8
Sports programs	26.6
Cultural programs	21.2
Dramas	21.0
Movies after midnight	16.0
Variety specials	16.0
Local current affairs	14.6
Children's shows	10.6
Talk shows	8.8
Game shows	4.5
Soap operas	3.5
Foreign language programs	3.2

Assuming that true programming markets are not limited to high demand, but can be based on both high and moderate demand, BCI combines "much more" and "some more" demand levels to identify program categories that have developmental possibilities. The results of the combination of demand levels (called a "positive" ranking by BCI) reveals some changes in rankings.

Documentaries	72.3
Full length movies	63.8
Adventure shows	60.3
Shows for the family	59.5
National current affairs	58.8
Comedies	56.6
Broadway-type shows	54.7
Dramas	53.3
Cultural programs	53.2
Sports programs	50.0

Variety specials	43.0
Local current affairs	41.0
Children's shows	36.8
Talk shows	31.5
Movies after midnight	30.1
Game shows	18.8
Foreign language programs	14.0
Soap operas	13.2

It should be noted that each person responding to the surveys may answer each category of programming with "much," "some" or "no" more. Consequently, the percentages represent the actual segment of those surveyed and their representative opinion on each program category. Due to the large sample size, interest levels can be interpreted as valid on a national base.

Programs and services offered

Included later in the questionnaire is a list of programs, services and interactive options generally considered for offering in franchise presentations. At this point in the survey, the interviewee is aware that some of the listed options will be offered as "basic," some as part of "public services" and others as additional "pay" options. They are aware that all or any on cable will entail some investment on their part as viewers. The results reported are for those programs and services identified by the respondents as those in which they would be "very" interested, indicating a high level of marketability by cable companies and programmers. These rankings are:

Academic credit courses	23.5 %
Medical health programs	15.9
Children's shows	14.9
Congressional sessions	13.3
24-hour sports	12.8
Consumer and price information	12.6
"Talking books" for the blind	11.3
Fine arts programs	10.8
24-hour weather	9.2
Additional, in-depth news	9.2
Shopping at home	8.6
Banking at home	8.2
Local school events	7.9
Women's issues programs	7.6
Ethnic programs	7.6
Religious programs	4.9
Local governmental meetings	4.8

Tier testing results

Although the BCI studies compare a variety of tiers of cable service, the options can be grouped for this summary into three major categories. First, basic plus one premium at $10 monthly or less; secondly, an additional premium service at $8 to $9 more monthly; and thirdly, security-fire-medical at an additional $15 monthly.

Nationally, the acceptance levels show:

For basic, plus one premium service at $10: 35.2 percent are *probably* interested. The range is from 30.8 percent to 41 percent. Thirty-two percent are *definitely* interested. The range is from 23 percent to 47.2 percent.

For additional premium (movie) channel at $8 to $9 more monthly, the results are: 30.6 percent are *probably* interested (ranging from 26.4 percent to 34.1 percent. Twenty-nine percent are *definitely* interested (ranging from 20.2 percent to 39.6 percent).

For additional security services at about $15 a month the answers show 16.3 percent are *probably* interested. The answers range from 13.3 percent to 20.9 percent across the nation. Eight percent are *definitely* interested (ranging from 2.9 percent to 12.0 percent).

Probable penetration

The BCI method asks the prospective cable subscriber to generally express interest in cable (basic or any other level) after hearing all of the options expressed in the questionnaire. This data is used to measure the overall likelihood of penetration in a given market.

Based on the 8,200 surveys across the country, BCI finds the following responses:

35.3 percent state that they are *highly likely* to subscribe.
(Range—24.2 percent to 47 percent)

30.8 percent are *somewhat likely* to subscribe.
(Range—22.6 percent to 45 percent)

26.9 percent state that they are *unlikely* to subscribe.
(Range—12 percent to 40 percent)

8.3 percent are *undecided.*
(Range—2 percent to 13.9 percent)

In order to arrive at reasonable short- and long-range penetration projections, it is necessary to make certain assumptions. Since no history exists to allow comparison between what prospective subscribers in a franchising area "think" they will do and what they actually act upon when an expenditure option is exercised, certain common sense assumptions are required to span the gap between the histories of older "cable antenna" systems and the "multiple option" systems being tested for the future.

BCI applies two criteria, one representing a "best case" assumption and another representing "modified option" assumption.

Using these two marketability assumptions, the short-range (one to five year history) projection for cable penetration in a typical national market would be:

80 percent of the "highly likely" subscribers	28.3%
70 percent of the "somewhat likely" subscribers	21.5%
50 percent of the "undecided" subscribers	4.1%
Total	53.9%

The total percentage would be validated as a short-range penetration figure in a typical cable franchise.

The longer-range projection would assume the effectiveness of program development and aggressive marketing and produce:

35 percent highly likely
30 percent somewhat likely
4 percent undecided
69 percent total

Therefore (as a national average), the cable planner could assume that a penetration slightly above 53 percent for the first five years, and a reasonable peak of around 70 percent beyond that point, would be realistic. It should be noted, however, that the 8,200 persons responding to this study are making judgments largely on product that they have heard of, are highly aware of, but generally have not experienced.

It should also be noted (as reflected in the acceptance ranges noted above) that *individual* franchise areas can vary significantly.

The singularly most evident fact to be concluded from all facets of the study is that the public is excited and positively expectant about cable service. A definite "hunger" and preconditioned "receptability" exists in the uncabled areas. The marketability of cable is very high. Product and service will determine if the measured expectations (as reflected in this composite study) turn into cable sales and stay in the subscriber fold after the product is sampled. CV

Slicing the pie

The race for cable's 1979 royalties is nearing the stretch run

WASHINGTON—The copyright Royalty Tribunal is in the midst of its annual rite known as the distribution hearings for cable royalties. This time around the commissioners will be divvying up the monies collected for cable retransmissions for 1979. In the scurry for a piece of the action, the National Association of Broadcasters and the joint sports claimants are asking for substantially more than they were granted in the 1978 pool.

Last year, the NAB and the sports interest were awarded 3.25 and 12 percent, respectively. During the current procedure, the NAB claims a right to 27 percent of the cable royalties; the joint sports claimants (including Major League Baseball, the National Basketball Association, the National Collegiate Athletic Association, the National Hockey League and the North American Soccer League) have requested 35 percent. These inflated claims will cause the CRT some difficulties; the top eight contenders alone have asked for 167 percent of the total amount collected, $13,782,179.86.

There are 636 total claimants asking for part of the 1979 royalties. The list is led by the Motion Picture Association of America, asking for 75 percent of the total, which is the same amount that all syndicated programmers were jointly given last year for the 1978 pool. The other top contenders are the music performing rights societies (ASCAP, BMI and SESAC)—nine percent; the Public Broadcasting Service—eight percent; and the Canadian Broadcasting Corporation—5.3 percent.

The claim by the sports interests is 23 percent higher than the amount granted last year and is causing some tension between broadcast concerns and the league representatives. According to CRT senior commissioner Thomas Brennan, the joint sports claim was boosted because "they felt the CRT criterion adopted this year was tailor-made for their interests." During last year's proceedings, the CRT stated that the entire percentage of cable royalties designated for sports programming would be awarded to the sports teams unless language in a contract stated otherwise. Brennan said that decision would not be in effect this year, leaving more room for jockeying between the broadcast and sports interests.

Last week, the sports claimants filed a motion with the CRT requesting a reaffirmation of the previous policy. Brennan said the CRT will act on it as soon as possible.

Meanwhile, the distribution of the 1978 cable royalties is still pending in the U.S. Court of Appeals for the District of Columbia. Last spring, in a three-to-two vote, the CRT decided to distribute 50 percent of the 1978 royalties, totalling $7,970,000, to those parties who were not subject to appeal.

However, the NAB challenged the proceeding, charging that all parties should be able to appeal. The NAB is slated to present its oral arguments in the case October 30.

In a related issue, the National Cable Television Association assured the CRT that it does indeed represent the cable industry in the royalty fee adjustment proceedings. Two months ago, the CRT requested comments on whether the association had standing to petition the CRT on behalf of its member cable systems.

Brennan explained that the request for comments was in response to a complaint by ASCAP stating that a petition by a trade association alone could be defective. ASCAP urged that the NCTA be required to be joined by at least one or two cable operators. Brennan said that, according to the Communications Act, a petitioner is required to be a user, in this case, a cable operator. In response, the NCTA said that it fulfilled the "significant interest" requirement of the Act, since it has "a significant interest" in "its member cable systems who are copyright users under the cable compulsory license and whom NCTA has standing to represent."

—David Price

Splitting the copyright pie

Following is a list of the percentage of cable royalties parcelled out to the top claimants for the 1978 pot, followed by their 1979 request.

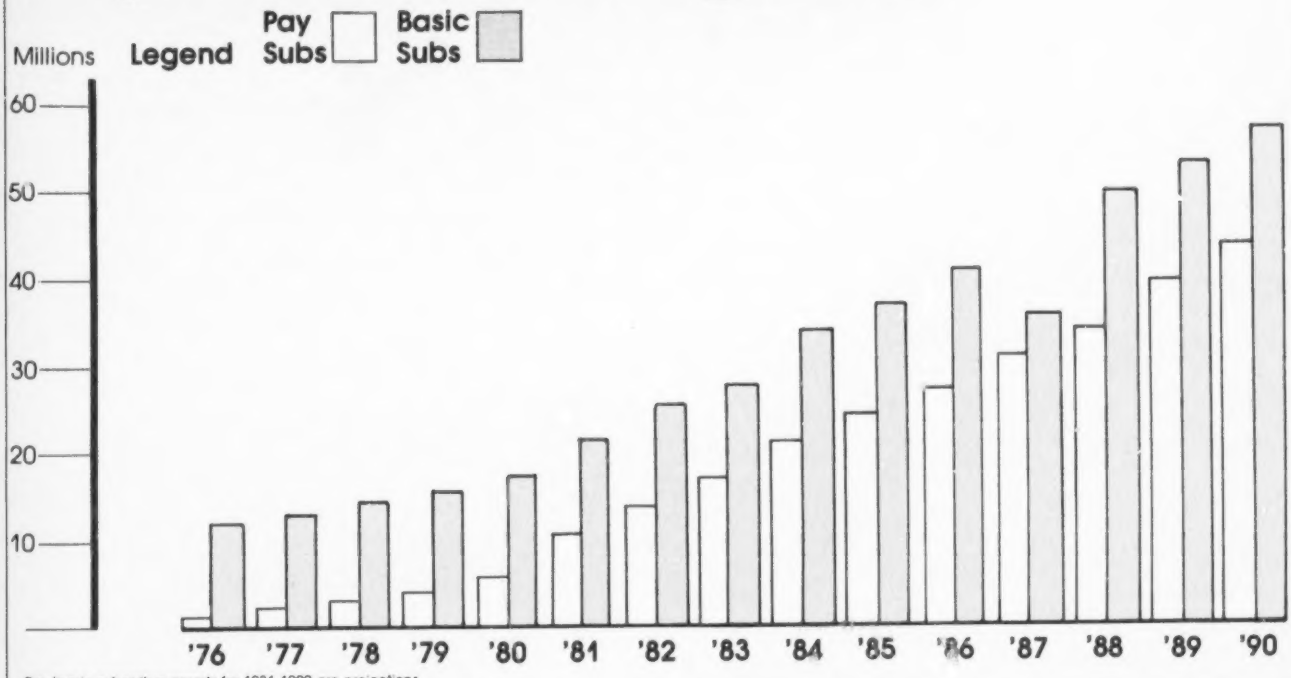
Claimant	1978 Share	1979 Request
Motion Picture Association of America	75%	75%
Joint Sports Claimants	12%	35%
Public Broadcasting Service	5.25%	8%
Music Performing Rights Societies	4.5%	9%
U.S. and Canadian Broadcasters	3.25%	†
National Association of Broadcasters	—	27%
Canadian Broadcasting Corporation	—	5.3%
National Public Radio	—	4%
Christian Broadcasting Network	*	4.03%

* In 1978, CBN was included with the MPAA and other program syndicators.
† In 1978, NAB and CBC were combined.

Partial distribution of 1978 royalties

Claimant	Amount
Motion Picture Association of America	$5,977,500.00
Major League Central Fund	956,400.00
Public Broadcasting Service	418,425.00
American Society of Authors, Composers and Publishers	193,671.00
Broadcast Music, Inc.	154,219.00
SESAC, Inc.	10,760.00
National Association of Broadcasters	187,491.70
Canadian Broadcasting Company	26,836.28
Turner Broadcasting System	8,541.91
Assorted claimants	36,155.11
Total	**$7,970,000.00**

Pay/basic cable growth



Pay/basic subscriber counts for 1981-1990 are projections.

Satellite line up

Satcom I (RCA Americom)

	Transponder
Warner Amex (Nickelodeon/ARTS)	1
PTL Television Network	2
United Video (WGN, WFMT, Lifestyle, JISAL, Dow Jones)	3
Inoperative	4
Warner Amex (The Movie Channel)	5
Southern Satellite Systems (WTBS, The Women's Channel, Cabletext, North American Newstime)	6
ESPN	7
Christian Broadcasting Network	8
USA Network, C-SPAN, Black Entertainment Television	9
Showtime (west)	10
Warner Amex (MTV: Music Television)	11
Showtime (east)	12
HBO owned, presently not working	13
Cable News Network	14
Warner Amex owned (RCA message traffic)	15
Showtime, ACSN, National Jewish Television, AETN, video teleconferencing	16
Showtime (used by Eastern Microwave for WOR)	17
Reuters, GalaVision (at night)	18
United Video (7:00 a.m. to noon) Times Mirror (Spotlight, noon to 7:00 a.m.)	19
HBO (Cinemax-east)	20
Landmark (Home Theatre Network during early evening)	21
HBO (west), Modern Satellite Network, leased for Daytime Jan. '82	22
HBO (Cinemax-west)	23
HBO (east)	24

Satcom IIIR—Projected launch October 1981, 24 transponders, 4/6 GHz
Satcom IV—Projected launch December 1981, 24 transponders, 4/6 GHz
Satcom V—Projected launch mid-1982
Satcom IR—Projected launch September 1983
Satcom IIR—Projected launch September 1983

Westar III (Western Union)

	Transponder
Audio	1
Hughes Television Network, Blairsat	2
Intelsat (Mexico)	3
Audio	4
Occasional use	5
CBS Cable	6
Satori (Private Screenings)	7
SIN	8
SSS (SPN)	9
ABC TV	10
CNN	11
Eternal Word TV Network	12

Westar IV—Projected launch February 1982
Westar V—Projected launch September 1982

Comstar D-2 (AT&T/GTE)

	Transponder
ESPN (Rainbow Programming/Bravo-evenings)	3H
National Christian Network (subleased to Rainbow/Escapade)	4V
SIN	4H
Warner Amex	6V
HBO (Cinemax-east, temporary)	7V
Showtime	8V
Trinity Broadcasting	9V
HBO	9H
American Medical Buildings	10V

Galaxy I (Hughes Communications)—Projected launch May 1983, 24 transponders, 4/6 GHz
Galaxy II—Projected launch September 1983, 24 transponders, 4/6 GHz
Galaxy III—Launch date pending demonstration of market demand, 24 transponders, 4/6 GHz

SPCC I (Southern Pacific Communications)—Projected launch February 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz
SPCC II —Projected launch October 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz
SPCC III—presently being built

1981-1982 designated market area TVHH estimates*

Rank	Designated Market Area	Jan. 1982 TVHHs	Current TVHHs
1	New York	6,538,600	6,409,720
2	Los Angeles, Palm Springs	4,316,800	4,214,600
3	Chicago	2,996,200	2,944,860
4	Philadelphia	2,431,100	2,400,780
5	San Francisco-Oakland	2,011,000	1,950,270
6	Boston, Manchester, Worcester	1,943,200	1,920,160
7	Detroit	1,677,500	1,658,910
8	Washington, DC	1,491,000	1,467,620
9	Cleveland, Akron	1,420,100	1,402,020
10	Dallas-Ft. Worth	1,381,700	1,355,900
11	Houston	1,287,200	1,255,010
12	Pittsburgh	1,217,900	1,202,490
13	Miami-Ft. Lauderdale	1,117,900	1,099,690
14	Seattle-Tacoma	1,123,900	1,093,860
15	Minneapolis-St. Paul	1,085,700	1,071,370
16	Atlanta	1,079,200	1,062,690
17	St. Louis	1,047,600	1,029,430
18	Tampa-St. Petersburg, Sarasota	1,046,500	1,028,780
19	Denver	876,900	858,930
20	Baltimore	845,300	835,150
21	Sacramento-Stockton	853,800	833,700
22	Indianapolis	816,400	804,420
23	Portland, OR	811,600	789,360
24	Phoenix, Flagstaff	749,300	727,150
25	Hartford & New Haven	715,600	707,810
26	Cincinnati	717,300	707,560
27	San Diego	717,400	699,110
28	Kansas City	700,800	688,930
29	Milwaukee	686,600	679,100
30	Nashville, Bowling Green	689,400	675,810
31	Charlotte	623,700	613,740
32	Buffalo	620,400	613,110
33	Providence-New Bedford	607,600	601,880
34	Orlando-Daytona Beach	605,800	595,990
35	New Orleans	600,700	590,880
36	Memphis	595,800	581,190
37	Columbus, OH	582,900	576,840
38	Greenville-Sparta-Asheville	585,000	574,160
39	Grand Rapids-Kalamazoo-B. Crk.	573,900	566,750
40	Birmingham, Anniston	574,600	563,670
41	Raleigh-Durham	541,400	530,890
42	Oklahoma City	537,500	528,260
43	Louisville	536,900	528,190
44	Salt Lake City	535,600	522,960
45	San Antonio	518,500	502 930
46	Charleston-Huntington	502,400	490,840
47	Norfolk-Portsmth-Newpt. Nws.	489,200	480,380
48	Harrisburgh-Lngstr-Leb.-York	485,000	473,620
49	Wilkes Barre-Scranton	475,800	469,230
50	Albany-Schenectady-Troy	468,600	463,300
51	Dayton	465,100	460,350
52	Greensboro-H. Point-W. Salem	457,700	449,510
53	Syracuse, Elmira	452,800	446,770
54	Flint-Saginaw-Bay City	447,800	443,610
55	Richmond-Petrsbg, Charltsvl.	438,800	429,540
56	Little Rock-Pine Bluff	440,200	429,150
57	Shreveport	438,700	427,530
58	Tulsa	429,000	420,190
59	Wichita-Hutchinson Plus	411,300	404,170
60	Toledo	406,000	401,590
61	Knoxville	402,000	392,380
62	Mobile-Pensacola	391,900	383,590
63	Jacksonville	378,600	371,510
64	Fresno (Visalia)	374,300	365,030
65	Roanoke-Lynchburg	368,100	360,390
66	Albuquerque, Farmington	368,600	350,710
67	Green Bay	350,000	347,130
68	West Palm Beach, Ft. Pierce	352,400	345,320
69	Des Moines-Ames	345,500	340,560
70	Omaha	342,800	337,630
71	Rochester	336,800	333,520
72	Spokane	341,400	331,800
73	Portland-Poland Spring	326,800	322,720
74	Davenport-R. Island-Moline	324,200	320,030
75	Champaign & Springfld-Decatur	321,700	316,150
76	Cedar Rapids-Watrloo, Dubuq.	318,500	313,950
77	Johnstown-Altoona	318,600	312,520
78	Honolulu	310,700	300,560
79	Paducah-C. Giradeau-Harrbg.	304,500	298,560
80	Chattanooga	291,400	286,150
81	South Bend-Elkhart	282,300	277,660
82	Tri-Cities: TN-VA	281,400	274,550
83	Lexington	276,200	264,960
84	Springfield, MO	271,700	264,190
85	Jackson, MS	267,800	260,260
86	Lincoln & Hstngs.-Krny. Plus	254,900	251,130
87	Tucson (Nogales)	258,100	250,380
88	Evansville	248,900	245,390
89	Austin	248,900	242,380
90	Huntsville-Decatur, Florence	243,200	239,160
91	Baton Rouge	239,900	235,920
92	Youngstown	236,300	233,880
93	Ft. Wayne	235,400	232,140
94	Columbia, SC	236,200	231,240
95	Springfield-Holyoke	231,700	228,530
96	Burlington-Plattsburgh	228,800	225,270
97	Peoria	224,600	221,050
98	Greenville-N. Bern-Washngtn.	223,700	218,560
99	Lansing	216,700	213,810
100	Sioux Falls (Mitchell)	213,000	210,150

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National advertising*

Network/Client	Status
CNN	
Allen Products (Alpo)	Renewal
Campbell Soup	Renewal
Cheeseborough-Ponds	New Client
Esmark (Playtex Division)	New Client
Ford (Lincoln-Mercury)	Renewal
General Foods	Renewal
Magnavox	New Client
McCullough Chain Saws	New Client
Reynolds Metals	New Client
Richardson-Vicks	New Client
Shell Oil Company	Renewal
Wang	New Client
MSN	
Hallmark Cards	New Client
Kellogg's	New Client
Kraft	Renewal
U.S. Gypsum	New Client
World Book/Childcraft (Field Enterprises)	Renewal
SPN	
American Fur Industries	New Client***
Avon Books	New Client
Dow Jones (Wall St. Journal)	Renewal
Doubleday (Literary Guild)	Renewal
Exxon	New Client
Ford (Lincoln-Mercury)	New Client
Home Box Office	New Client
SIN	
Armour Dial	New Client
H.J. Heinz (Ore-Ida Foods)	New Client
J.C. Penney	New Client
Johnson & Johnson (Personal Products Division	Renewal

* This chart lists national advertising sales by basic cable networks during August 1981. Last week's "Cable stats" on national advertising covered ARTS, ESPN, MTV and USA Network.
** Some CNN buys were made shortly before August 1981.
*** New to network advertising.